

Catholic Family Services of Durham

# Strategic Plan 2023-2026

Approved by the Board  
April 12, 2023

# **Catholic Family Services of Durham Strategic Plan 2023-2026**

## **Introduction**

In October 2022, Catholic Family Services of Durham (CFSD) embarked upon the development of a three-year Strategic Plan for the Agency. The previous Strategic Plan expired in 2021, part-way through the COVID-19 pandemic. The CFSD Board of Directors delegated oversight of the project to the ad hoc Strategic Planning Committee (SPC), comprised of board members and senior staff, with the help of an independent facilitator. This report is the product of the SPC's deliberations.

## **Purpose of a Strategic Plan**

This strategic plan is intended to serve CFSD as a high-level, directional plan that will help guide the organization over the next few years April 2023 to March 2026. More specifically, this plan:

- clarifies the Agency's purpose (mission);
- clearly articulates the principles (values) that form the foundation for CFSD's work;
- establishes directional priorities that reflect and respond to current and emerging trends and challenges facing the Agency;
- is informed by stakeholder input; and,
- will help to inform/shape decisions pertaining to potentially significant expenditures.

This plan is not:

- about day-to-day operations;
- divisional or program-specific; nor
- does it take the place of an annual service plan and budget.

## **Methodology**

The SPC met on October 26, 2022 to discuss and approve the overall Work Plan<sup>1</sup> and the approach to be used to engage the Agency's internal and external stakeholders in the planning process. The SPC approved the stakeholder consultation framework at its November 16, 2022 meeting.

Why gather information from stakeholders?

1. Stakeholder perspectives help to inform the plan by identifying:
  - a) internal strengths and challenges; and,
  - b) external opportunities and risks.

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<sup>1</sup> Appendix A: Work Plan

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2. Stakeholders provide insights about the Agency’s identity – how it may be perceived within the broader community. An external perspective is particularly useful as it serves as a reality check – as a way of validating how CFSD may perceive itself, and to identify where CFSD’s views are or are not aligned with stakeholder perspectives.
3. The invitation to stakeholders to participate in the strategic planning process strengthens the organization’s brand in the eyes of stakeholders, building trust and opening doors to potential collaboration.

During the week of November 21, 2022, the Executive Director (ED) sent an invitation to all stakeholders, asking them to participate. Response rates are shown below:

- Funders (3) and Community Partners (27) were invited to complete separate online surveys. Two of three Funders provided input and 22 responses were received from Community Partners. Online surveys were open from November 21, 2022 to November 30, 2022.
- Employees were invited to complete an online survey and attend a Staff focus group discussion. The online survey for Staff was open from November 21, 2022 to November 29, 2022. The focus group meeting was held on November 29, 2022. 19 responses to the Staff survey were received, and 20 Staff attended the focus group discussion.
- Members of the Board of Directors were invited to share their perspectives about CFSD and its future at a Board focus group discussion on November 26, 2022. 10 Board members attended this meeting.

<b>Stakeholder Segment (N)</b>	<b>Online Survey</b>	<b>Focus Group</b>
Community Partners (27)	22	N/A
Staff (24)	19	20
Funders (3)	2	N/A
Board of Directors (12)	N/A	10

The project facilitator compiled the survey and focus group data, and prepared and presented a *Summary Report of Stakeholder Consultation* to the SPC on December 7, 2022. This summary report was subsequently amended and presented to the CFSD Board of Directors on December 14, 2022.

Note: Rather than launching a new initiative to capture the voices of Clients in this process, the SPC adopted the 2021 Evaluation Report of client experience, prepared by Anne Bergen, PhD. in February 2022. The SPC considered this report to be sufficiently current to reflect the experiences of clients who utilized the services of CFSD’s Psychotherapy Division. The SPC observed that this data was closely aligned with that of the other stakeholders.

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The CFSD Young Parent Support Division intends to start collecting similar information in order to ensure that feedback from these clients is also collected and evaluated in the future.

The SPC met on January 10 and 17, 2023 to refine the CFSD Mission statement (to reflect the merger with the Rose of Durham) and update the Agency's Values statements. Also, at the request of the Board, although not in scope initially, the SPC explored the possibility of adding a Vision statement.

On January 27, 2023, the SPC discussed the Mission and Values statements, the latter being informed by feedback from Staff collected by the Executive Director to help inform the Committee's deliberations. The SPC then generated a preliminary set of strategic priorities for the planning period.

The Committee presented a summary overview of the draft Strategic Plan to the Board of Directors on March 8, 2023.

### Stakeholder Perceptions

The following represents summary highlights from the presentation to the Board of Directors on December 14, 2022.<sup>2</sup>

a) Strengths:

- | As Perceived by Community Partners:  | As Perceived by Staff:  |
|--|---|
| <ul style="list-style-type: none"><li>• Staff and leaders</li><li>• Service philosophy</li><li>• Accessibility</li><li>• Collaboration</li></ul> | <ul style="list-style-type: none"><li>• Staff and leaders</li><li>• Relevant programming, client focussed; person centred</li><li>• Reputation in the community</li></ul> |

b) Obstacles & Challenges:

- Long waitlists, not enough staff
- Workload, caseload, time constraints
- Agency's name
- Lack of resources – space, materials

c) Societal Shifts & Emerging Trends: *Strong correlation across all stakeholder groups*

**#1. Rising numbers of cases and increasing complexity of cases** involving:

- a) mental illness (including addictions, and opioid use);
- b) economic concerns (poverty, food insecurity, employment insecurity, inflation and rising costs, financial insecurity);
- c) housing insecurity and homelessness; and

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<sup>2</sup> Appendix 'B': Presentation of Findings from Stakeholder Consultations

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- d) violence impacting families.
- #2. (tied)
  - a) **Staff retention**, and
  - b) **Need for Parenting Supports** in community.

## Strategic Plan Framework

The SPC used the following planning framework to help guide its deliberations:

<b>Mission</b> Our purpose; our daily focus. Describes what we do and for whom	<b>Values</b> The principles and beliefs that help underpin decision-making	<b>Vision</b> (not in scope initially) An aspirational goal or statement about what an organization is striving for; the desired outcome of all our efforts
<b>Strategic Priorities</b> Directional statements of focus and priority for the planning period that reflect/respond to stakeholder input		
Focus 1	Focus 2	Focus 3
Priorities: <ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> </ul>	Priorities: <ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> </ul>	Priorities: <ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> </ul>

## Mission (Our purpose/mandate)

The CFSD Mission describes what the Agency does and for whom. Mission is intended to give ‘purpose’ to those who are delivering services and their leaders, and to position the organization for others outside of CFSD to have a clear understanding of the nature of the services being provided. In this process, the SPC recommends the following update be made to the current Mission.

- a) Current Mission:  
 We exist to provide help, hope and healing to individuals, couples and families, regardless of beliefs, through evidence-based clinical therapy and psycho-educational counselling, and support.
- b) Proposed Mission:  
 We provide help, hope and healing to individuals, young parents, couples and families, regardless of beliefs. We do this through evidence-based psychotherapy and counselling, education and support.

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### Values (Our guiding principles/beliefs)

Values tell people what is important around here. They provide a foundation for decision-making, developing organizational culture, and as a touchstone for fairness. Values do not exist in isolation to each other, nor is one more important than the other. In this process, the SPC recommends the following proposed update to the Agency's current set of Values.

a) Current Values Statement:

Catholic Family Services of Durham holds the following values:

- Provide services with regard for the dignity, freedom and equality of all persons;
- Serve with a spirit of compassion; and
- Serve with a commitment to excellence and integrity.

b) Proposed Values Statement:

CFSD embraces the following core values as being foundational to our approach:

- **Inclusive:** creating spaces where all are welcome and accepted, and feel that they belong.
- **Responsive:** anticipating and adjusting to the needs of the diverse communities we serve; seeking creative ways of thinking and adapting.
- **Collaborative:** working with our staff, board, clients and community partners to achieve shared goals and positive outcomes.
- **Professional Excellence:** maintaining professional ethics and exemplary standards of practice; upholding a learning culture.

### Vision Statement

A Vision Statement is intended to be future-oriented, describing what the Agency is constantly striving to achieve. Like many other organizations, CFSD does not have a statement that articulates its vision for the future. At the direction of the Board, the SPC explored the pros and cons of creating an organizational Vision Statement, and after considerable discussion, recommends that the Board not add a Vision Statement at this time, leaving the possibility of such to a future time.

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## **Strategic Priorities**

The SPC identified three areas of primary focus, each with its own set of priorities as follows. *(Note: the numbering system is used here for ease of identification, and not as an indication of importance).*

1. Advance an organizational culture that embeds and promotes diversity, equity and inclusion (DEI).
  - 1.1. Further develop cultural humility at all levels of the Agency (governance, employment and service delivery).
  - 1.2. Strengthen and explore new strategic partnerships with select community organizations that enhance our ability to serve the community through a DEI lens.
  - 1.3. Ensure Agency policies support DEI practices at all levels.
  
2. Enhance service sustainability and organizational capacity.
  - 2.1. Strengthen and expand partnerships with select community organizations.
  - 2.2. Explore, strengthen and expand funder relationships.
  - 2.3. Identify opportunities for innovation in response to evolving needs.
  - 2.4. Seek out innovative ways to attract, retain and develop staff.
  - 2.5. Develop succession plans for key staff and board positions.
  
3. Affirm our strong, compelling identity.
  - 3.1. Develop a marketing and engagement strategy to promote our newly merged Agency, and clearly articulate who we are, what we do, and for whom we do it.
  - 3.2. Advocate for appropriate (growth and base) funding to better enable us to serve our communities.

## **Implementation of Strategic Plan**

Key responsibilities for implementation of this strategic plan are as follows:

- Strategic priorities provide direction from the Board to Senior Management.
- Senior Management has the responsibility to “operationalize” these directives, work with others to establish goals, and report on progress.
- The Board will monitor the implementation of the Strategic Plan at regular intervals over the course of the Plan’s three-year term. The Executive Director will report on the progress of the Strategic Plan through the Operational Plan reports, the monthly Executive Director Report, and the year-end Executive Director Report to the Board.

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<b>Mission</b>	<b>Values</b>	
We provide help, hope and healing to individuals, young parents, couples and families, regardless of beliefs. We do this through evidence-based psychotherapy and counselling, education and support.	We embrace the following core values as being foundational to our approach: Inclusive, Responsive, Collaborative, and Professional Excellence.	
<b>Strategic Priorities 2023-2026</b>		
Advance an organizational culture that embeds and promotes diversity, equity and inclusion.	Enhance service sustainability and organizational capacity.	Affirm our strong, compelling identity.



**Catholic Family Services of Durham  
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Planning Framework	Timeline
<b>1. Project Planning</b>	
<b>SPC Meeting #1:</b> Formation of Strategic Planning Committee (SPC): determine deliverables, scope, planning horizon, expectations & obstacles, confirm work plan and timeline.	Oct. 26 <sup>th</sup> 7:00-8:30 pm
<b>2. Situational Analysis</b>	
a) <b>SPC Meeting #2:</b> Review design of stakeholder consultation process including survey and focus group questions: <ul style="list-style-type: none"> <li>• Survey (online):               <ul style="list-style-type: none"> <li><input type="checkbox"/> Funders (3 organizations)</li> <li><input type="checkbox"/> Community partners (27 organizations)</li> </ul> </li> <li>• Rather than asking Psychotherapy Division clients to complete a survey, we will use the results published in the 2021 Client Experience Report.</li> <li>• Clients of Young Parents Support Division will be asked to complete an internally developed experience survey.</li> </ul>	Nov. 16 <sup>th</sup> @ 7:00 pm
b) Invite stakeholders (CFSD)	Week of Nov. 21 <sup>st</sup>
c) Conduct stakeholder consultations (surveys and focus groups): <ul style="list-style-type: none"> <li><input type="checkbox"/> Survey opens, Nov. 21<sup>st</sup></li> <li><input type="checkbox"/> Board focus groups, Nov. 26<sup>th</sup></li> <li><input type="checkbox"/> Staff focus groups, Nov. 29<sup>th</sup></li> <li><input type="checkbox"/> Survey closes, Nov. 30<sup>th</sup></li> </ul>	Nov. 21 <sup>st</sup> to 30 <sup>th</sup>
d) Analyze stakeholder data and prepare summary presentation of themes	Dec. 1 <sup>st</sup> to 7 <sup>th</sup>
e) <b>SPC Meeting #3</b> <ul style="list-style-type: none"> <li>• Present summary from stakeholder consultations</li> <li>• Discussion: Identify key internal and external forces expected to impact CFSD during the planning period (strengths, challenges, opportunities, risks).</li> </ul>	Dec. 7 <sup>th</sup> 6:00-8:30 pm with refreshments
f) Presentation of situational analysis (high level) to Board by SPC	Dec. 14 <sup>th</sup> @ DAFRS 6:30 pm start

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*Continued...*

<b>3. Mission and Values</b>	
Discussions with SPC pertaining to mission and values statements <b>a) SPC Meeting #4</b> <b>b) SPC Meeting #5</b> (if required)	Jan. 10 <sup>th</sup> @ 7:00 PM Jan. 17 <sup>th</sup> @ 7:00 PM
<b>4. Strategic Priorities</b>	
<b>SPC Meeting #6:</b> <ul style="list-style-type: none"> <li>• Discuss values</li> <li>• Identify key directions/priorities and goals for planning period.</li> </ul>	Jan. 27 <sup>th</sup> 1:00-4:00 pm
<b>5. Report Preparation &amp; Approval</b>	
<b>SPC Meeting #7:</b> Prepare 1 <sup>st</sup> draft of Strategic Plan Report	Feb. 8 <sup>th</sup> @ 4:00 PM
Next Steps: <ul style="list-style-type: none"> <li>a) Develop draft Strategic Plan presentation for Committee's review; request feedback with Reply-All</li> <li>b) Presentation of plan highlights to Board.</li> <li>c) Prepare Strategic Plan Report for Board review</li> <li>d) Approval by Board.</li> </ul>	March 8 <sup>th</sup> March 31 <sup>st</sup> April 13 <sup>th</sup>

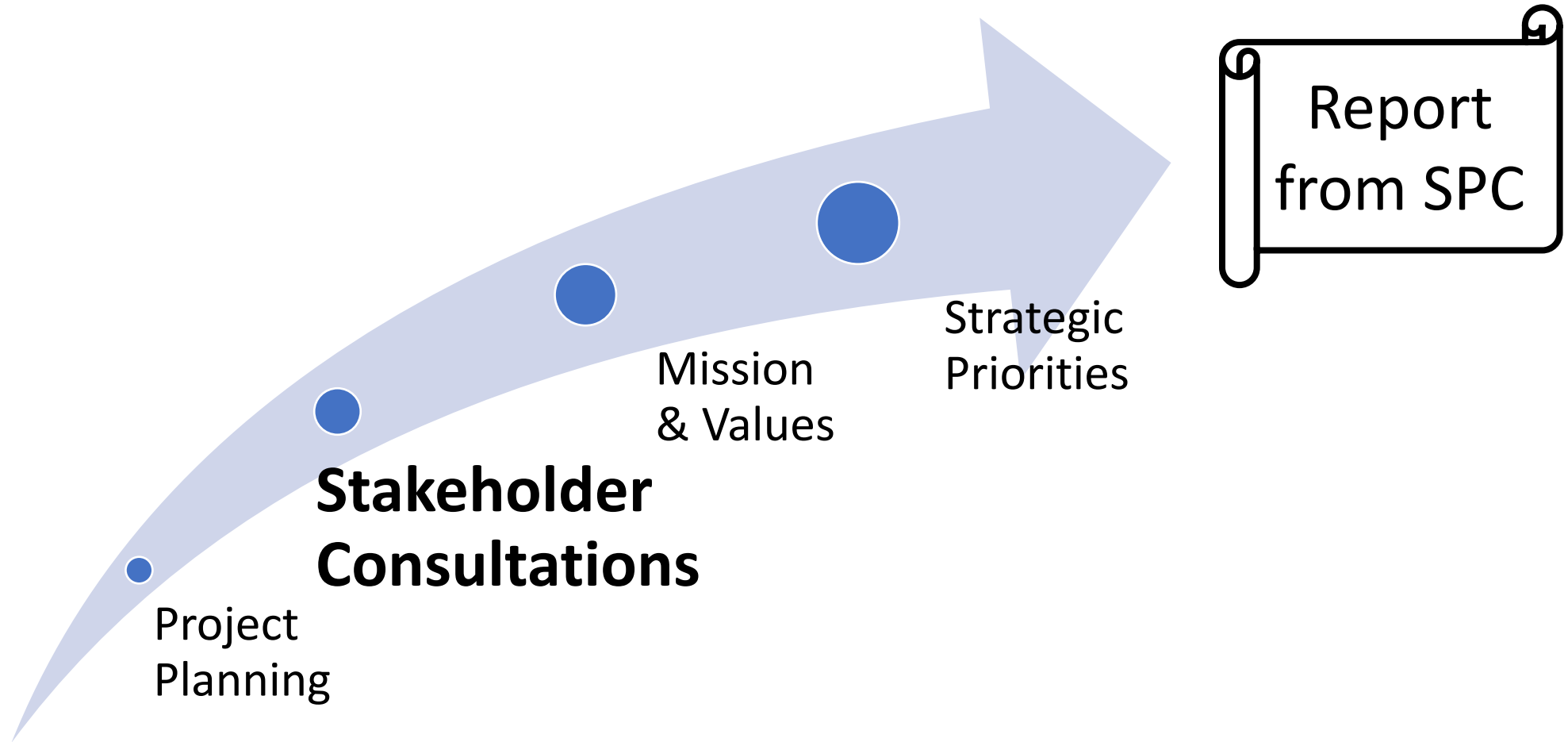
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## **Stakeholder Consultations**

Presentation of Findings by the  
Strategic Planning Committee

December 14, 2022

# Phase: Gathering Stakeholder Input



# Purpose

Stakeholder input is essential to having a community-informed plan for the next three years.

This evening's presentation will focus on feedback received from internal and external Stakeholders:

- 1) Perceptions of CFSD's current strengths and challenges,
- 2) Societal shifts and emerging trends to consider in the development of our strategic plan, and
- 3) Comments about updating CFSD's Mission statement, and other considerations.

# Stakeholder Consultation Phase

## Surveys:

1. Clients \*
2. Staff
3. Funders
4. Community Partners

## Focus Groups:

1. Board: November 26<sup>th</sup>
2. Staff: November 29<sup>th</sup>

# Stakeholder Participation

Stakeholder Segment * (N)	Online Survey	Focus Group
Community Partners (27)	22	N/A
Employees (24)	19	20
Funders (3)	2	N/A
Board (12)	N/A	10

\* Clients not included

# Strengths of CFSD

## As perceived by Community Partners:

Staff & Leaders (10)

Service Philosophy (10)

Accessibility (7)

Collaboration (5)



## As perceived by Employees:

Staff & Leaders (20)

Relevant programming, client focussed; person centred (8)

Reputation in Community (5)



# Current Obstacles & Challenges

Long waitlists, not enough staff

Workload, caseload, time constraints

Agency's name

Lack of resources – space, materials

# Societal Shifts & Emerging Trends

**Strong correlation across all stakeholder groups**

#1. Increasing complexity and rising volumes:

- Mental health
- Economic (poverty, food insecurity, employment insecurity, inflation and rising costs, financial insecurity, )
- Housing insecurity and homelessness
- Violence impacting families

T-#2. Staff retention, and need for Parenting Supports

# Planning Priorities: preliminary

## A. Serving the Community:

- Branding to support name change
- Further development of culturally responsive / humility services (DEI)
- Partnerships: strengthen and expand
- Innovation: program development/delivery

# Planning Priorities: preliminary

## B. Developing Organizational Capacity:

- Focus on DEI (knowledge building, representation)
- Targeted funding to address current and future unmet needs
- Expand capability in data analytics to support evidence based funding requests
- Staffing (retention and growth)
- Develop one-agency identity (post-merger)

# Planning Priorities: preliminary

## C. Governance:

- Focus on DEI (knowledge building, representation)
- Leadership development and succession planning
- Funding advocacy
- Complete ONCA transition

# Mission Statement

Our purpose:

**“We exist to provide help, hope and healing to individuals, young parents, couples and families, regardless of beliefs. We do this through evidence-based ~~clinical therapy~~ psychotherapy and ~~psycho-educational~~ counselling, education and support.”**

(proposed revisions reached by consensus with Board on Nov. 26<sup>th</sup> and with Staff on Nov. 29<sup>th</sup>)

# Mission Statement: Agency's Purpose

## **Current**

“We exist to provide help, hope and healing to individuals, couples and families, regardless of beliefs, through evidence-based clinical therapy and psycho-educational counselling, and support.”

## **Suggestions from Board and Staff**

“We exist to provide help, hope and healing to individuals, young parents, couples and families, regardless of beliefs. We do this through evidence-based psychotherapy and counselling, education and support.”

# SPC Work Plan

Task	Target Completion
1. Project Planning with Strategic Planning Committee (SPC)	Oct. 26 <sup>th</sup>
2. Situational Analysis <ul style="list-style-type: none"><li>• Design stakeholder consultation process</li><li>• Administer surveys and facilitate focus groups</li><li>• Analyze data</li><li>• Discuss findings with SPC</li><li>• Discuss high-level themes with Board</li></ul>	Nov. 16 <sup>th</sup> Nov. 30 <sup>th</sup> Dec. 7 <sup>th</sup> Dec. 7 <sup>th</sup> <b>Dec. 14<sup>th</sup></b>
3. Mission, <b>Vision</b> & Values	Jan 10 <sup>th</sup> and 17 <sup>th</sup>
4. Strategic Priorities	Jan. 27 <sup>th</sup>
5. Report Preparation and Approval <ul style="list-style-type: none"><li>• Presentation to Board</li><li>• Submit report to Board</li><li>• Board meeting to consider Plan</li></ul>	<b>March 8<sup>th</sup></b> March 31 <sup>st</sup> April 13 <sup>th</sup>



Questions?